

	U	1	Document ID	Issue Date	Pages	Title
1	X		US 6996539 B1	20060207	33	Method and apparatus for enabling smaller investors or others to create and manage a portfolio of securities or other assets or liabilities on a cost effective basis
2	X		US 6895390 B1	20050517	24	System for monitoring increasing income financial products
3	X		US 6868408 B1	20050315	75	Security systems and methods applicable to an electronic monetary system
4	X		US 6801199 B1	20041005	16	Method and apparatus for interacting with investors to create investment portfolios
5	X		US 6601044 B1	20030729	45	Method and apparatus for enabling individual or smaller investors or others to create and manage a portfolio of securities or other assets or liabilities on a cost effective basis
6	X		US 6516303 B1	20030204	18	Method, system, and apparatus for managing taxable events within a portfolio
7			US 6424952 B1	20020723	12	Method of providing means to pay for total future educational expenses to attend an institution of higher learning
8	X		US 6415267 B1	20020702	35	System for monitoring increasing income financial products

	Abstract	Current OR	Current XRef	Retrieval Classification	Inventor	S	C	P	2	3	4
1			705/35; 705/37		Wallman; Steven M. H.						
2		705/35	705/4		Hagan; Bernard P.						
3		705/64	380/228; 705/50; 713/156; 713/171		Rosen; Sholom S.						
4		345/440	345/440.2; 345/442; 345/629; 715/764		Wallman; Steven M. H.						
5		705/36R	705/35; 705/37		Wallman; Steven M. H.						
6		705/36T	705/37		Wallman; Steven M. H.						
7		705/36R	705/4		Yinbal; Alazar	X					
8		705/36R			Hagan; Bernard P						

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1	US 6996539	
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6	US 6516303	
7	US 6424952	
8	US 6415267	

	U	1	Document ID	Issue Date	Pages	Title
9	X		US 6161098 A	20001212	20	Method and apparatus for enabling small investors with a portfolio of securities to manage taxable events within the portfolio
10	X		US 6061661 A	20000509	24	System for monitoring increasing income financial products
11	X		US 6047887 A	20000411	99	System and method for connecting money modules
12	X		US 6047067 A	20000404	74	Electronic-monetary system
13	X		US 6012043 A	20000104	36	Computerized system and method used in financial planning
14	X		US 5963648 A	19991005	73	Electronic-monetary system
15	X		US 5920629 A	19990706	74	Electronic-monetary system
16	X		US 5799087 A	19980825	74	Electronic-monetary system
17	X		US 5689649 A	19971118	14	System for operation of a combination mortgage, equity load and savings plan
18			US 4839804 A	19890613	51	Method and apparatus for insuring the funding of a future liability of uncertain cost
19			US 4752877 A	19880621	56	Method and apparatus for funding a future liability of uncertain cost

	Abstract	Current OR	Current XRef	Retrieval Classification	Inventor	S	C	P	2	3	4
9		705/36T			Wallman; Steven M.H.						
10		705/36R			Hagan; Bernard P.						
11		235/379	235/492		Rosen; Sholom S.						
12		705/68	235/379; 705/41; 705/69; 902/26		Rosen; Sholom S.						
13		705/36R	705/35; 706/45		Albright; William R. et al.						
14		705/67	235/379; 705/41; 705/75; 902/2		Rosen; Sholom S.						
15		705/69	235/379; 705/41		Rosen; Sholom S.						
16		705/69	235/379; 705/41; 902/2		Rosen; Sholom S.						
17		705/36R	705/38		Altman; Robert et al.						
18		705/36R	705/4		Roberts; Peter A. et al.	X					
19		705/36R	235/379		Roberts; Peter A. et al.	X					

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